

Hull Teaching Primary Care Trust

ANNUALISED HOURS GUIDANCE

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1. INTRODUCTION

Hull Teaching PCT is committed to improving working lives and recognises that flexible working can positively impact on our ability to recruit and retain staff and assist staff to achieve and maintain a balance between their work and home lives.

This guidance aims to assist managers and staff to consider annualised contracts and to enable them to calculate annual leave for annualised contracts.

Research shows that an unsatisfactory work-life balance can result in ill-health, low morale, lack of commitment, poor quality work, absenteeism and high staff turnover. By assisting staff to achieve a better work-life balance the benefits for the PCT could include cover for absence and holidays, greater flexibility, higher employee motivation and commitment, increased morale and better recruitment and retention.

The purpose of this guidance is to calculate the hours that an employee will work throughout the annualised hours period and to enable calculation of annual leave entitlement.

2. SCOPE

This guidance applies to all PCT employees irrespective of age, race, colour, religion, disability, nationality, ethnic origin, gender, sexual orientation or marital status, domestic circumstances, social and employment status, HIV status, gender reassignment, political affiliation or trade union membership. All employees will be treated in a fair and equitable manner and reasonable adjustments will be made where appropriate (e.g. interpreter or signing provision, access arrangements, induction loop, etc.).

3. KEY PRINCIPLES

The PCT recognises that there are benefits for both the PCT and staff in adopting flexible working patterns and annualised hours contracts can work in a number of ways. The following list is not exhaustive, but provides some examples:

- Working more hours when children are at school and less hours when they are on school holidays
- Working in blocks of a number of weeks at work and a number of weeks off
- Committing to a minimum amount of hours to be worked per month (can be as little as one shift)

- Seasonal working (such as only working through the winter months)

4. GUIDANCE

Employees wishing to change their hours must complete the Flexible Working Application Form (Appendix 1).

Once the manager and employee have agreed on an annualised hours contract they must complete a change form and attach a completed, signed copy of Appendix 1 (Flexible Working Application Form) and Appendix 3 and 4 (Annualised Hours Spreadsheet), then forward these to the Finance Department. The Finance Department will log it, forward a copy of all documentation to the Human Resources Department and send the original to the IPS Department.

An electronic version of Appendix 3 and 4 is available from Human Resources and should be used to make annualised hours calculations.

Any change of an annualised hours agreement must follow appropriate consultation with the member of staff and their trade union representative.

5 CALCULATING THE HOURS

It is vital that managers closely monitor any proposed leavers/transfers in the first 6 months of the holiday year for those working more hours during term time and less hours during school holidays. There are 10 weeks school holidays during the first 6 months of the holiday year and technically staff with term time annualised contracts are overpaid during this period (this only rectifies itself as accrual is built over the last 6 months of the holiday year).

Use of the annualised hours spreadsheet is required for ease of calculation, a copy of which should be printed out and sent to the IPS Department as evidence of the correct calculation. The spreadsheet caters for all professions, all service entitlements and for both full and part year periods of time.

N.B. The agreed number of working weeks for term-time only is 39 weeks. The agreed number of Bank Holidays in any one full annual leave year is 8 days.

The essential information to be agreed between the manager and the member of staff is as follows:

- Number of weeks that the calculation is to be based on, e.g. 52.143 weeks for a full year
- Number of weeks to be worked during this period, e.g. term-time only = 39 weeks (this figure must equal the total number of weeks for this calculation period, **minus** the number of weeks planned to be taken as holiday)
- Number of hours/sessions to be worked each week. If hours per week are entered, the calculations are given in hours. If sessions per week are entered, the calculations are given in sessions.
- Holiday entitlement in weeks, if the employee was full-time (e.g. 4.4 weeks per year, 5.4 weeks per year)
- How many Bank Holidays fall within the period of time (e.g. 8 days per year for a full annual leave year)

6 USING THE EXCEL SPREADSHEET

Please see separate guide for using the Excel spreadsheet to calculate annualised hours (Appendix 3)

7 RECORDING HOURS WORKED

It is essential that the employee completes a weekly Annualised Hours Record (Appendix 2) and submits this to their line manager on a monthly basis.

Sickness should be recorded on this form as paid hours.

8 STUDY LEAVE/PARENTAL LEAVE

This should be recorded on the Annualised Hours Record (Appendix 2) as paid hours

9 ADOPTION/MATERNITY/PATERNITY LEAVE

Taking adoption/maternity/paternity leave on an annualised hours contract should be in line with local policies and paid in accordance with agreed weekly paid hours. The annualised hours record (Appendix 2) should be used to reflect the appropriate leave

10 SECONDMENT/LEAVERS/CHANGES IN HOURS

Annual leave should be closely monitored jointly by the employee and their line manager in the months approaching a secondment/change in hours/leaver. If there will be an excess of entitlement outstanding on the employee's last day, the PCT will make a payment and if an excess of

leave has been taken by the employee's last day the PCT will make a deduction.

A recalculation of annualised hours will be necessary when staff change their working hours.

11. AUDIT

The manager will undertake an audit trail on an annual basis, which will consist of a review of the following:

- Annualised hours record
- Holiday record
- Study Leave
- Parental Leave
- Maternity/Paternity/Adoption Leave

12. REVIEW

This guidance will be reviewed with the PCT's recognised Trade Union Partners within 2 years of the date of implementation.

Author: UNISON representative
Date: 29th January, 2007

Approved by: _____ Date: _____

Reviewed by: _____ Date: _____

HULL TEACHING PRIMARY CARE TRUST

Flexible Working Application Form

Note to the employee

You can use this form to make an application to work flexibly. You should ensure that you submit your application to your line manager as far in advance of the date you wish the request to take effect as you can. Once you have completed the form you should forward it to your line manager and discuss your request with them.

1. Personal Details

Name:

Job Title:

Department:

Manager:

Describe your current working pattern (days/hours/times worked)

Describe the working pattern you would like to work in future (days/hours/time worked)

I would like this working pattern to commence from:

Date:

Impact of the new working pattern

I think this change in my working pattern will affect my employer and colleagues as follows:

Accommodating the new working pattern

I think any effect on my employer and colleagues can be dealt with as follows:

Name..... Date.....

Now pass this application to your line manager.

Dear.....

Following receipt of your application and our meeting on [date] I have considered your request for a new flexible working pattern.

I am pleased to confirm that I am able to accommodate your application Y/N
I am unable to accommodate your original request. However, I am able to offer the alternative pattern which we have discussed and you agreed would be suitable for you. Y/N

[Delete as appropriate]

Your new working arrangements will begin from [date]

I attach a change form and would ask that you check and sign it and return it to me at your earliest convenience.

Name..... Date.....

Forward to employee.

Forward a copy to Human Resources for monitoring purposes.

Ensure a copy is retained on the employee's personnel file.

Appendix 2

Forward to employee. Forward a copy to Human Resources for monitoring purposes by the 5th of the following month. Ensure a copy is retained on the employee's personnel file.

ANNUALISED HOURS RECORDING SHEET MONTH200..

| Name: | | Job Title: | | Manager |
|--------------------------------------|-----|---|---|---------|
| Weekly paid hours: | | Full Year/annualised hours to be worked | | |
| DATE | DAY | HOURS WORKED | Annual hours still to be worked B/frd hours | |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| 6 | | | | |
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| 28 | | | | |
| 29 | | | | |
| 30 | | | | |
| 31 | | | | |
| Total hours worked this month | | | Hours still to be worked. B/Fwd (as above) minus worked hours worked this month: | |
| | | | C/fwd Hours | |

I certify that the above times are accurate and correct.

Employee's signature Date

Manager's signature

"I declare that the information given in the form is correct and complete. I understand that if I provide false information I may be liable for disciplinary, civil/ Prosecution and possible subsequent recovery of any loss howsoever committed"

Hours paid this month (for payroll purposes only)

Example 1 For a full year, a school nurse with 4 years service, working 25 hours per week term time only

| Annualised Hours and Pro-rata Annual Leave | | Mandatory fields to be completed by manager | |
|--|----------------|---|---|
| Name | A N Other | | School Nurse |
| Date of Calculation | FROM | TO | Job Title |
| | e.g 01/04/2004 | e.g 31/03/2005 | School Nurse |
| | 01/04/2004 | 31/03/2005 | 52.143 Weeks |
| Number of weeks to be worked in this period | 39 | | If term time only, for a full year, this figure will always be 39 weeks |
| Hours/sessions per week to be worked during this period | 25 | | |
| This section only to be used if a period of work is to be done at different weekly hours/sessions to above (optional, not mandatory) but please note that the total number of weeks worked cannot exceed 44 weeks i.e. E13 + E19 cannot be greater than 44 weeks | | | |
| Number of weeks during this period to work different number of hours/sessions | | | 975 Hours/sessions |
| Hours/sessions per week to be worked during this period | | | 0 Hours/sessions |
| Bearing in mind, profession and years of service, how many weeks holiday would this employee be entitled to if full-time e.g. 4.4, 5, 5.4, 6 weeks | 5.4 | | |
| How many Bank Holidays fall within this calculation period ? | 8 | 1.6 | 7.00 |
| Good Friday, Easter Monday, May Day, May Spring Holiday, August Bank Holiday, Christmas Day, Boxing Day, New Years Day. | | | |
| Pro-rata Annual Leave calculation plus pro-rata Bank Holidays entitlement | | | 151.19 |
| Annualised hours inclusive of Annual Leave entitlement | | | 1126.19 |
| Hours/sessions to be worked during this period | | | 975.00 |
| Annualised hours/sessions per week | | | 21.60 |

Example 2 For part year, a clerical assistant with 5 years service, working 20 hours per week for 8 weeks of a 12 week period which includes 2 Bank Holidays

| | | | |
|--|---|---|--------|
| Annualised Hours and Pro-rata Annual Leave | | Mandatory fields to be completed by manager | |
| Name | A N Other | | |
| Job Title | Clerical Assistant | | |
| Date of Calculation | FROM | TO | Weeks |
| | e.g 01/04/2004 | e.g 31/3/2005 | 12.000 |
| | 01/04/2004 | 23/06/2004 | |
| Number of weeks to be worked in this period | 8 | | |
| Hours/sessions per week to be worked during this period | 20 | | |
| | if term time only, for a full year, this figure will always be 39 weeks | | |
| | 160 Hours/sessions | | |
| This section only to be used if a period of work is to be done at different weekly hours/sessions to above (optional, not mandatory) but please note that the total number of weeks worked cannot exceed 44 weeks i.e. E13 + E19 cannot be greater than 44 weeks | | | |
| Number of weeks during this period to work different number of hours/sessions | | | |
| Hours/sessions per week to be worked during this period | 0 | | |
| Bearing in mind, profession and years of service, how many weeks holiday would this employee be entitled to if full-time e.g. 4.4, 5, 5.4, 6 weeks | | | |
| | 5 | | |
| How many Bank Holidays fall within this calculation period ? | | | |
| | Good Friday, Easter Monday, May Day, May Spring Holiday, August Bank Holiday, Christmas Day, Boxing Day, New Years Day. | 0.4 | 1.55 |
| Pro-rata Annual Leave calculation plus pro-rata Bank Holidays entitlement | | | |
| | | | 23.74 |
| Annualised hours inclusive of Annual Leave entitlement | | | |
| | | | 183.74 |
| Hours/sessions to be worked during this period | | | |
| | | | 160.00 |
| Annualised hours/sessions per week | | | |
| | | | 15.31 |